An Authoritative “Record” Collection

By JoAnne Robinett, MSA, SNS

While not as glamorous as a vinyl record collection, your kitchen’s production records are an essential meal management tool.

Production records. Not a terribly exciting or revelatory topic—especially when compared to some of the other subjects (such as unusual grains, nutrition education, pop-up shops) covered in this month’s School Nutrition. But don’t flip past this article thinking you won’t learn anything new! As a longtime trainer, I’ve observed a fair share of mistakes and misunderstandings in how cafeteria teams complete, maintain and use production records in their daily operations.

Let’s begin with a basic refresher: Production records differ from menus and standardized recipes, although each document is important in the process of complying with federal requirements for reimbursable meals. Menus detail what is being served. Standardized recipes are used to produce specific menu items that contribute to the different parts of the meal pattern in a consistent way. Production records document the type and amount of foods prepared, how those foods fit into the requirements, how much was served and what remained after service. This working tool provides all this data at a glance—and much more when you read between the lines. A production record can be a helpful management tool. Here are some thoughts to becoming a production (record) pro!

TOOL OF THE TRADE
Production records are required for every reimbursable meal occasion. You must complete one for lunch under the National School Lunch Program and a different one if you are serving breakfast in the School Breakfast Program. If you are claiming meals and snacks under other federal child nutrition programs (such as the Child and Adult Care Food Program), you will need production records for these, too.
There is no “official” format for food production records, but they must include all information necessary to support the claim for reimbursement. Those elements are:

- Date
- Site
- Meal type
- Grade group
- Offer vs. Serve status
- Planned numbers of meals to be served (students and adults)
- All menu items
- Recipe or product number
- Planned portion size
- Planned number of servings
- Meal pattern contribution for each menu item (optional but recommended)
- Total planned quantity
- Actual number of meals served (students and adults)
- Actual number of servings

Regardless of how the record is formatted, ensure that all the above information is included for each meal. The lead school administrator in your school district should check with the state agency, as representatives might require you to maintain records in a specific format or use a particular form or document template. The state agency may also require additional information not included on this list of fundamental elements.

If your state agency does not mandate a style for formatting, these records can be maintained in print, on a computer spreadsheet or an electronic document that lives in the “cloud.” They can have a vertical or horizontal orientation. They might fit on a single page or spread across multiple pages. Details can be handwritten, entered on the computer or a combination. Be consistent—agree on a style with your supervisor and stick with it for all records.

Production records should be kept in a way not only to provide support documentation for your meal reimbursements, but in a manner that lets you use the records as a tool to improve your cafeteria operation. Production records can aid in forecasting participation, controlling food costs, managing inventory and assuring compliance. The general rule is that these records need to be kept on file for three years (plus the current year); again, check with your state agency for its specific requirements.

**DATA ENTRY**

Who should record info on the record? Everyone—that is, everyone on the team may contribute to collecting the data, because different team members have varying responsibilities in the production and service of the meal. Who knows the most about a particular category? The person who knows how many pizzas were cooked may not be the same individual who knows how many were left over. Even the manager may not know every detail. If the production record is an electronic tool managed by only one person, be sure to have a method to collect information from the rest of the team members.

Certain elements of the production record should be completed in advance, before the meal period. Other categories on the record must wait until you are actually serving the meal or after the last student has exited the cafeteria. Let’s take a closer look at the details for each of the categories that should be entered before the kids arrive.

**Date** and **site** seem foolproof, but guard against mistakes. (Who hasn’t written the wrong date at the beginning of a new month or week—or after you’ve been focused on future events?) When documenting the **site**, if this is not pre-printed or pre-populated on the form, be sure this requirement is not left blank. It may be obvious to you, but you don’t want to make it harder for the person managing the pile of records from multiple schools.

Because meal pattern requirements differ between lunch and breakfast (and snacks), it’s important to note the **meal type**. Meal patterns also vary among **grade groups**—K–6; 6–8; 9–12 (along with a K–8 option).

**Offer versus Serve (OVS) status** has been designated in your agreement with the state agency prior to the start of each school year. The program administrator has indicated whether a student will automatically be served every required component without being given the option of declining any items or if a student may decline certain components and still receive the meal in the applicable price category. OVS is mandatory at the high school level, but is optional for other grades.

Whatever your program administrator indicated in the paperwork on file with the state agency is what you must be doing at the site level. The numbers recorded on the production record should support that this is what is actually happening. For example, let’s say you are operating an OVS program. If you have planned and prepared 100 meals, and the production record indicates there were no leftover servings at the end of the day, I would be concerned that all students were compelled to take full trays of food, even if they indicated they wanted to decline items. This means your team was not practicing OVS—and some training may be necessary. Production records tell a story.

**Planned numbers of meals to be served** is a projection made ahead of time about expected participation. It has been used to order food and to communicate to staff how much to prep.

“All” means **all**. **All menu items** must include everything—all the choices, the a la carte items and the milk. Even condiments need to be accounted for, as they will affect nutrient analyses. Every one of those aforementioned menu items needs further clarification by the **recipe or product number**. Every menu item that is **assembled** in the kitchen must have a recipe: salads, cold sandwiches, even fruit and vegetables if there was anything added to them, including a mere seasoning! A recipe code is used for any product that was modified for service by the addition of another product.

Don’t have recipe codes or numbers? Work with your supervisor to develop a simple system. You can base these on menu components, such as
main dish (MD) or salads (S). Then assign recipe numbers: MD–1, MD–2, etc. Keep a master list of the coding. And remember that menu items that aren’t assembled, but are served whole, packaged or direct from a package, also need to be recorded. Indicate whether it’s a brand or a USDA Food item.

Maintaining and recording recipe and production numbers and codes seems like a lot of extra steps—but if you simply write “chicken patty,” you aren’t being specific enough to account for the many types of products and recipes that feature a chicken patty.

The planned portion size needs to be specific. If you offer a fresh apple, what size is it? The smallest apple size is a “216” and the largest is a “48” (these reflect how many fit in a 40-lb. crate). There are four times the number of calories in the largest apple, and not enough fruit to provide a one-cup serving in the smallest. Your production records need to reflect whether meal pattern requirements and nutrient specifications were met. Prep cooks will rely on this entry if they are pre-portioning foods. Servers will reference this column to assure they are using the correct serving utensils.

The planned number of servings is the forecasted participation for each menu item. For example, you expect to serve 200 hamburgers, but only 125 servings of the green bean side dish. It is okay that these numbers are not the same if you have implemented OVS, or if you offer multiple choices within the meal components. If you keep good production records, you can reference other occasions you served this combination to see how the plan varied from the actual. The historical data that production records generate is invaluable and can help with future planning.

Optional but recommended, the meal pattern contribution for each menu item indicates if a food item credits as one of the five required lunch components: meat/meat alternate, grain, fruit, vegetable or milk. Some production record templates also include vegetable subgroups.

Go to: www.schoolnutrition.org/OnlinePDAs

“An Authoritative ‘Record’ Collection”

Completion of this test, with a passing score, will count as 1 Continuing Education Credit (CEU) in Key Area 2, Operations, Food Production Records, Code 2120.

(Please Print)
Name:__________________________________________________________
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1. Production records, menus and standardized recipes are variations of the same document.
   □ True □ False

2. Production records must be completed in _______.
   □ the official template provided by USDA
   □ a computerized spreadsheet
   □ a single-page document
   □ None of the above

3. Production records are only referenced when the state comes to conduct the Administrative Reviews.
   □ True □ False

4. In general, production records should be kept on file ______ after the current year.
   □ six months
   □ one year
   □ three years
   □ indefinitely

5. An Offer versus Serve (OVS) approach is established _______.
   □ at the start of the school year
   □ at the start of each week
   □ on a day-to-day basis
   □ none of the above

6. Production records need to account for _______.
   □ reimbursable meal components
   □ a la carte items
   □ condiments and seasonings
   □ all of the above

7. A side dish of roasted potatoes with rosemary requires a recipe code or number.
   □ True □ False

8. A piece of whole fruit, like a fresh apple, always counts as one serving.
   □ True □ False

9. A category for ______ is not required, but is recommended for school meal production records.
   □ the number of serving lines
   □ the square footage of storage space
   □ the amount of leftovers
   □ none of the above

10. It’s helpful if your production record includes a section for miscellaneous notes.
    □ True □ False

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Total planned quantity is easy when counting an individual item like a premade burrito. But how do you handle bulk items where you can't individually count the quantities of key ingredients, such as refried beans? In this case, you could weigh the pans or indicate how many cans you used. Be consistent in your system and specific in the details; there's a big difference between a #10 can and a #303 or a 2-in. pan and a 6-in. one.

**AT THE END OF THE MEAL**

A few categories on the production record can't be completed until after service has concluded. Notably, the actual number of meals served (students and adults) is taken from the Point of Service counts. It does not have to match the amount of servings—you are simply confirming the number of people who ate the meal. Keep true numbers for the different categories.

It's helpful to add a new category to your production record to capture the leftover amounts of different menu items. This helps you to calculate the actual number of servings. You also want to account for what happened to the leftovers—even if they were discarded—so that the numbers of what was prepped and served all align.

What happens if you ran out of a menu item, say burritos? You fed the kids, of course, but the substitute needed to fall into the same meal component category as the burritos. This means it had to have a grain and meat. Be sure your production record reflects that additional items were prepped and served, whether you whipped up more servings of the original item (burritos) or an alternative (ham sandwich) was provided. Overlooking this step on the record will lead to misinterpretation of the data.

**MENU MISCELLANY**

Trays of food get dropped. Pizza burns. Portions were massive when the principal stepped in to serve. The entire fifth grade didn’t show up when they were on a field trip and no one told you in advance. Your food production record should reflect these little side stories. Make sure there’s a section where you can capture such helpful notes.

Production records help with both long-term planning and ongoing tweaking to ensure your team is operating at peak efficiency and that you are managing your costs. And for those once-a-year special events (like a Thanksgiving meal with roast turkey)? The story that last year’s production record will tell about the number of cases of turkey to order or the number of guests to expect will surely help relieve some of your holiday stress!

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